THE NATIONAL BANK of INDIANAPOLIS

The National Bank of Indianapolis

Job Posting: Trust and Estate Administration Specialist

A Stable and Growing Employer

The National Bank of Indianapolis is the largest, locally owned, national bank in greater Indianapolis. Since opening our doors in 1993, we have grown from 18 employees to more than 330 employees. Our strength and success in serving the local market is directly attributable to our talented staff. With greater than 90% staff retention year after year, and with a highly competitive benefit package, our staff enjoy a sense of stability not always experienced in the general work environment. Benefits include but are not limited to: medical/dental/vision/life insurance, vacation, personal time, holidays, tuition reimbursement, 401(k), profit sharing, and wellness benefits.

Who We Are Looking For

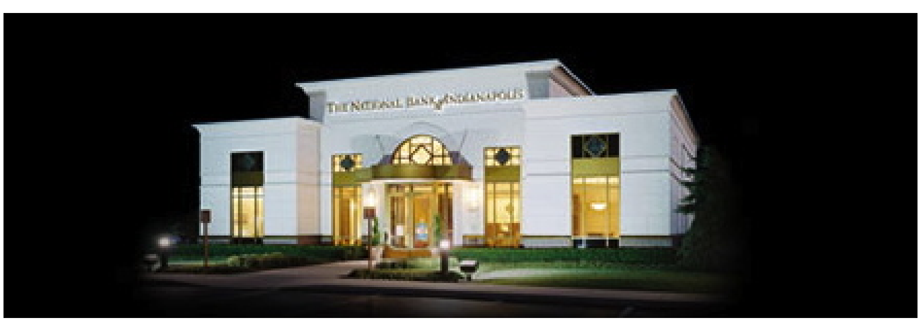
The National Bank of Indianapolis has assembled our talented staff by hiring only the best, whether highly experienced professionals or those just entering the workforce. We are looking for those who are committed to delivering superior service to our clients and superior teamwork to their coworkers. Along with the relevant knowledge and experience, The National Bank of Indianapolis requires its employees to have both a high degree of professionalism and a commitment to excellence.

How to Apply

To express interest in an open position at the Bank, please email your resume to Resumes@NBofI.com or call 317/261-3271.

We invite you to learn more about The National Bank of Indianapolis at http://nbofi.com/careers.php

The National Bank of Indianapolis is an Equal Opportunity Employer (Minority/Female/Disability/Veteran)



JOB POSTING
Position: Trust and Estate Administration Specialist

Purpose of Position: This position serves as the primary operational contact for account opening and closing for the Personal Trusts and the Trust Legal, Tax & Estates departments. The incumbent facilitates communication between the two departments as well as Wealth Management Operations, ensuring consistency in the administrative process for accounts. The incumbent must be able to deliver exceptional service while ensuring accuracy in addition to compliance with Bank policies and regulations. Independent judgment is required to plan, prioritize and organize a diversified workload supporting a large number of administrative officers with the assigned functions.

Essential Functions:

- Assists with account opening for trusts and estates, including but not limited to completing account opening paperwork, entering data on trust accounting system to open account, ensuring that all required documents have been completed or obtained and are accurately entered for processing or recordkeeping
- Assists with collection of assets at account opening, including but not limited to communicating with prior custodian and working with the Wealth Management Operations department to set up and deposit assets
- Facilitates communication between officers in Personal Trusts and Trust Legal, Tax & Estates, ensuring consistency in administrative processes for accounts
- Assists administrative officer to transition the account to the CSM after account opening
- Assists with distribution of assets at account closing, including but not limited to communicating with successor custodian and working with the Wealth Management Operations department to deliver assets
- Assists with account closing for trusts and estates, including but not limited to completing account closing paperwork, entering data on trust accounting system to close account, ensuring that all required documents have been completed or obtained and are accurately entered for processing or recordkeeping
- Assists with other account administration activities, including but not limited to annual unitrust distribution calculations and preparation of inventories and accountings for guardianship accounts
- Assists with coordination of personal tax returns with outside tax preparers for special needs trust beneficiaries and guardianship accounts
- Serves as secretary of the Administrative Subcommittee and compiles necessary reports for the subcommittee
- Generates spreadsheets, forms and follow-up lists for monitoring activity

Requirements:

- Bachelor's Degree or equivalent work experience
- Minimum of five years of experience supporting trust and estate administration activities
- Proven written and verbal communication skills, with strong emphasis placed on responsiveness and customer service
- Demonstrated track record of communicating effectively and proactively with a wide variety of individuals in multiple departments
- Extremely high degree of accuracy and attention to detail
- Proven ability to complete complex calculations and accountings for trusts and estates
- Strong working knowledge of Microsoft applications, especially Excel
- Excellent interpersonal skills, exhibiting a high degree of professionalism
- Strong team orientation and demonstrated work ethic
- Ability to interpret data to solve problems; ability to organize and prioritize tasks

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